

Colorado Springs School District 11
Records Retention Schedule

**SCHEDULE XI
FOOD SERVICE**

General Description: Records generally relating to providing food and nutrition services within the school district. *The specified retention period applies to the information contained within the record, regardless of the physical format of the record (paper, microfilm, electronic file, optical disk, etc.).*

1. **Food, Chemical, Paper, and Supply Inventories** that document all purchases and/or donations, received and distributed by the District during the administration of the Food and Nutrition Services program.

Retention: 3 years after submission of the final Claim for Reimbursement for the fiscal year
Format: Original Creation
Location: Office of Food & Nutrition Services (Office of Record)

Inactive records within this record series are stored at the District's warehouse or electronically and destruction is managed by the Director of Food and Nutrition Services.

2. **Food Equipment Inventories** that record major pieces of equipment and purchase price, date of purchase, and asset number cafeteria and kitchen equipment.

Retention: 3 years after submission of the final Claim for Reimbursement for the fiscal year
Format: Paper or electronic
Location: Office of Food & Nutrition Services (Office of Record)

Inactive records within this record series are stored at the District's warehouse or electronically and destruction is managed by the Director of Food and Nutrition Services.

3. **Daily Food Production Record** documenting the quantities of food planned, prepared, served, and discarded each day at every serving location.

Retention: 3 years after submission of the final Claim for Reimbursement for the fiscal year
Format: Paper or electronic
Location: Office of Food & Nutrition Services (Office of Record)

Inactive records within this record series are stored at the District's warehouse or electronically and destruction is managed by the Director of Food and Nutrition Services.

4. **Meals Served Report** that identifies the daily number of meals served in each school.

Retention: 3 years after submission of the final Claim for Reimbursement for the fiscal year
Format: Paper or electronic
Location: Office of Food & Nutrition Services (Office of Record)

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5. **Prepaid Meal Record** that records information of payments made in advance to include online payment.

Retention: 3 years after submission of the final Claim for Reimbursement for the fiscal year
Format: Paper or electronic
Location: Office of Food & Nutrition Services (Office of Record)

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Duplicate Copies: retain those that are created for **administrative purposes** for 1 year, and retain those created for **convenience or reference purposes** until no longer needed or for 1 year, whichever is first. Duplicate copies should not be retained longer than the record copy.

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6. **Free/Reduced Meal Roster** that lists the names of the participating students.

Retention: 3 years after submission of the final Claim for Reimbursement for the fiscal year
Format: Paper or electronic
Location: Office of Food & Nutrition Services (Office of Record)

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7. **Free/Reduced Price Meal Records** which include application for free or reduced prices and compliance, certification, and verification records. May include additional criteria that a district uses in making a decision to approve an application.

Retention: 5 years after submission of the final Claim for Reimbursement for the fiscal year
Format: Paper or electronic
Location: Office of Food & Nutrition Services (Office of Record)

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8. **Daily Receipt Reports** that document the food/meal sales receipts for each day. May include Point of Sale System sales, cash sales, and a summary report.

Retention: 3 years after submission of the final Claim for Reimbursement for the fiscal year
Format: Paper or electronic
Location: Office of Food & Nutrition Services (Office of Record)

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9. **Federal Claim for Reimbursement** that supports and documents the total number of free, reduced, paid breakfasts and lunches served during the each month that is being claimed for reimbursement of federal funds.

Retention: 3 years after submission of the final Claim for Reimbursement for the fiscal year
Format: Paper or electronic
Location: Office of Food & Nutrition Services (Office of Record)

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10. **Food Purchase Orders (includes food commodities)** that authorize the delivery of a specified food product, merchandise showing the amount of funds authorized for the same.

Retention: 3 years after submission of the final Claim for Reimbursement for the fiscal year
Format: Paper or electronic
Location: Office of Food & Nutrition Services (Office of Record)

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11. **Invoices** that identify a request for payment to a vendor for food, goods, or services in accordance with approved purchase orders or P-Card purchase.

Retention: 3 years after submission of the final Claim for Reimbursement for the fiscal year
Format: Paper or electronic
Location: Office of Food & Nutrition Services (Office of Record)

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12. **Food & Nutrition Services Annual Report and Audit Supporting Documentation**, which documents in summary fashion the activities of this service area for the past year.

Retention: Current plus 5 years
Format: Paper or electronic
Location: Office of Food & Nutrition Services

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13. **Commodity Records** related to the distribution and usage of USDA donated foods that may include the following:

- a. Commodity Agreement with the school district
- b. Current/Monthly Commodity Inventory
- c. Food Preference Reports
- d. Commodity Delivery Invoices/Delivery Tickets Signed
- e. Processing and Storage Invoices
- f. USDA Commodity Rebate Forms
- g. Food Transfer Record (food transferred to another school)
- h. Food Loss/Destroyed Inventory

Retention: 3 years after submission of the final Claim for Reimbursement for the fiscal year
Format: Paper or electronic
Location: Office of Food & Nutrition Services (Office of Record)

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14. **Point of Sale System Records** that document monies received by Food & Nutrition Services for meals and services rendered.

Retention: 3 years after submission of the final Claim for Reimbursement for the fiscal year
Format: Paper or electronic
Location: Office of Food & Nutrition Services

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15. **Food Safety Temperature Logs or HACCP (Hazard Analysis Critical Control Points) Records** which document Critical Control Points of food safety and HACCP reviews or audits.

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<u>Retention:</u>	HACCP Logs: 6 months after food was served.
<u>Retention:</u>	HACCP Reviews, Audits, or inspections: 3 years after submission of the final Claim for Reimbursement for the fiscal year
<u>Format:</u>	Paper or electronic
<u>Location:</u>	Office of Food & Nutrition Services (Office of Record)

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16. **Training Records** for current employees that document professional development and USDA Professional Standards compliance.

<u>Retention:</u>	3 years after submission of the final Claim for Reimbursement for the fiscal year
<u>Format:</u>	Paper or electronic
<u>Location:</u>	Office of Food & Nutrition Services (Office of Record)

Inactive records within this record series are stored at the District's warehouse or electronically and destruction is managed by the Director of Food and Nutrition Services.

1. The Federal fiscal year is from October 1 through September 30.
2. No records are to be destroyed under this retention schedule without an exhausted review to insure records are not under a *Suspension of Destruction* order from the Custodian of Records or may be subject to future litigation and identified records have been properly transferred to the Records Management Center.
3. No records are to be destroyed under this retention schedule without the written authorization from the Director of The Food and Nutrition Services Program and the Deputy Superintendent/CFO on the *Destruction Authorization Form*.
4. The signed *Destruction Authorization Form* along with the *Certificate of Destruction* will be sent to the Records Management Center.
5. The Food and Nutrition Service Director will notify the Custodian of Records when any aspect of this Retention Schedule changes, including but not limited to:
 - Statute changes
 - New records are created
 - Records on this schedule are no longer maintained

From Electronic Code of Federal Regulations

https://www.ecfr.gov/cgi-bin/text-idx?SID=5a75c833b9c0dcc60c0b9cc07bed6d6e&node=7:4.1.1.1.1&rgn=div5#se7.4.210_115

Title 7 → Subtitle B → Chapter II → Subchapter A → Part 210 National School Lunch Program

§210.9(b) (17) Upon request, make all accounts and records pertaining to its school food service available to the State agency and to FNS, for audit or review, at a reasonable time and place. Such records shall be retained for a period of 3 years after the date of the final Claim for Reimbursement for the fiscal year to which they pertain, except that if audit findings have not been resolved, the records shall be retained beyond the 3 year period as long as required for resolution of the issues raised by the audit;

§210.15 (5) Records from the food safety program for a period of six months following a month's temperature records to demonstrate compliance with §210.13(c), and records from the most recent food safety inspection to demonstrate compliance with §210.13(b);

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§210.23(c) *Retention of records.* State agencies and school food authorities may retain necessary records in their original form or on microfilm. State agency records shall be retained for a period of 3 years after the date of submission of the final Financial Status Report for the fiscal year. School food authority records shall be retained for a period of 3 years after submission of the final Claim for Reimbursement for the fiscal year. In either case, if audit findings have not been resolved, the records shall be retained beyond the 3-year period as long as required for the resolution of the issues raised by the audit.

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